

**1 Sharon Elaine Bess (CONS/P)**  
Conservator Christian, Elsie J. (Pro Per)  
Attorney Kruthers, Heather K. (for Public Guardian)

**Case No. 0241225**

**Probate Status Hearing Re: Possible Removal of Conservator**

<b>Age: 56</b>	<b>ELSIE J. CHRISTIAN</b> , sister, was appointed Successor Conservator of the Person.  <u>Please see petition for details</u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Minute Order of 01/25/2016: Ms. Kruthers requests time for the Public Guardian to determine if this matter would be an appropriate case for their office to handle. The Court orders Elsie Christian to obey all laws, to not drive, and to not consume any alcohol or drugs.
<b>Cont. from 012516</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
<b>Reviewed by: LV</b>		
<b>Reviewed on: 02/24/2016</b>		
<b>Updates:</b>		
<b>Recommendation:</b>		
<b>File 1 - Bess</b>		

**2 Wilma Ruth Manuel (Estate)****Case No. 0609019****Attorney David N. Knudson (for Cynthia Blackstock, Executor)****Second and Final Account and Report of Executor, for Statutory and Extraordinary Fees, and Final Distribution**

<b>DOD: 10/8/1997</b>		<b>CYNTHIA BLACKSTOCK</b> , daughter and Executor appointed on 8/26/1998, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> <b><u>CONTINUED TO 4/11/16</u></b> <b>Per attorney request</b>
<b>Cont. from</b>		<b>Account period: 10/1/2013 – 12/31/2015</b>	<ol style="list-style-type: none"> <li>Petition states during these proceedings, Petitioner was granted a fee waiver, and Petitioner acknowledges that upon entry of an order for final distribution, said filing fees must be paid to the Court before release of the order; Petitioner states she will cause the appropriate fees to be paid as necessary. Court records show the following fees previously waived totaling <b>\$632.00</b> are now due from Petitioner: <ul style="list-style-type: none"> <li>Fees for 3 certified copies of ex parte order on 10/29/2012 of <b>\$76.50</b>;</li> <li>Fee for 1 copy of the Minute Order dated 10/5/2012 of <b>\$50</b>;</li> <li>Fee for filing Probate Code § 850 petition on 10/25/2012 of <b>\$435.00</b>;</li> <li>Fee for filing an ex parte Motion to Consolidate of <b>\$60.00</b>;</li> <li>Fee for filing an ex parte Motion to Quash of <b>\$60.00</b>.</li> </ul> </li> <li>Need declaration in support of attorney's extraordinary fee request, as stated in <i>Petition</i> will be filed prior to the instant hearing.</li> <li>Need proposed order pursuant to Local Rule 7.1.1 (F) providing that a proposed order shall be submitted with all pleadings that request relief.</li> </ol>
	<b>Aff.Sub.Wit.</b>	Accounting - <b>\$190,000.00</b>	
✓	<b>Verified</b>	Beginning POH - <b>\$190,000.00</b>	
✓	<b>Inventory</b>	Ending POH - <b>\$190,000.00</b> (real property)	
	<b>PTC</b>	Executor - <b>waives</b>	
✓	<b>Not.Cred.</b>	Attorney - <b>\$6,700.00</b>	
	<b>Notice of Hrg</b>	(statutory; attorney agrees statutory compensation is to be a lien against the real property distributed to Petitioner;)	
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>	Attorney XO - <b>Need declaration</b>	
	<b>Pers.Serv.</b>	(for services listed on Pages 5 to 7 of <i>Petition</i> , including will and trust contest; petition to revoke probate; complaint for ejectment/confirm title; Washington State proceedings; preliminary injunction against foreclosure; unlawful detainer; recovery of funds from Edward Kent; attorney agrees extraordinary fees are to be a lien against the real property distributed to Petitioner;)	
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>9202</b>	Costs - <b>\$304.00</b>	
	<b>Order</b>	(filing fees, certified copies, transcripts)	
	<b>Aff. Posting</b>	<b>Petitioner states:</b>	
	<b>Status Rpt</b>	<ul style="list-style-type: none"> <li>With the exception of rejecting two creditor's claims, Petitioner has taken no action on the others (<i>Exhibit A lists the creditor's claims filed</i>); during the full course of administration of the estate, the estate has lacked sufficient funds to pay creditors claims;</li> </ul>	
	<b>UCCJEA</b>	<b>~Please see additional page~</b>	
	<b>Citation</b>		
✓	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 2/24/16
			<b>Updates:</b> 2/25/16 (skc)
			<b>Recommendation:</b>
			<b>File 2- Manuel</b>

**Petitioner states, continued:**

- Franchise Tax Board claim filed 8/28/1998 for **\$348,196.00** was withdrawn; claim of **MICKEY MANUEL, SR.**, for **\$4,000,000.00** was rejected on 1/6/1999, and no action was brought on the rejected claim;
- The claim of **MICKEY MANUEL, SR.**, for **\$29,000.00** was filed 8/23/2012 after the claim filing period, the claim was rejected, an action was brought on the rejected claim [12CECL05667], and the action was consolidated into the probate action;
- After giving notice to beneficiaries and receiving no objections, Petitioner entered into an agreement encumbering the estate's real property on Pleasant in Fresno, which loan was necessary to cure back property taxes; the estates real property will be distributed subject to said encumbrance;
- *Partial Inventory No. 1* is the final inventory for the estate and shows all of the assets of the estate; no other assets have come into Petitioner's possession;
- The assets remaining for distribution consist of a residence with an appraised value of **\$190,000.00**; the estate consists of the Decedent's separate property;
- The estate has debts and expenses of administration which have not been paid; Petitioner proposes to distribute the residence subject to the recorded lien [loan noted above] and subject to a lien for expenses of administration, including statutory attorney fees and extraordinary fees approved by the Court;
- Decedent's will devises the real property on Pleasant to Petitioner and **ANGELA MANUEL**, Decedent's daughter, who subsequently died, resulting in the real property on Pleasant as distributable to Petitioner; Decedent's Will devises the residence in Kent, Washington to her grandchildren, **ALISHA WATTS, TSION MULUGETA**, and **LEONARD WILLIAMS**; that residence was misappropriated and stolen by Decedent's son, **MICKEY MANUEL, JR.**, and despite initiating ancillary proceedings in Washington State, no part of it was recovered, and the gift has lapsed;
- Decedent's Will devises tangible personal property to Petitioner, which she took possession of and declares the property had no significant value, for which she waives an accounting;
- Decedent's Will gives **\$1.00** to **MICKEY MANUEL, JR.**, with the intent that he be disinherited; Petitioner is unaware of his residence, save that she believes he is out of the state of California under threat of prosecution for criminal activity;
- Special Notice requested by the Franchise Tax Board was withdrawn; special notice requested by **MICKEY MANUEL, SR.**, and Petitioner believes he died in the summer of 2015.

**Distribution pursuant to Decedent's Will is to:**

- **CYNTHIA BLACKSTOCK** – residence on Pleasant in Fresno, subject to specified liens.

**Petitioner prays for an Order:**

1. The Second and Final Account be settled, allowed, and approved as filed;
2. The real property on Pleasant in Fresno be distributed to Petitioner subject to:
  - (a) The existing note and deed of trust of **~\$42,000.00**;
  - (b) Statutory fees payable to Attorney Knudson of **\$6,700.00**;
  - (c) Extraordinary fees payable to Attorney Knudson in an amount as approved by the Court **[Need amount]**;
  - (d) Costs advanced of **\$304.00**.

## Petition for Commissions and Fees for the Public Guardian and Her Attorney

		<b>PUBLIC GUARDIAN</b> is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Public Guardian was appointed conservator of the person and estate on 7/2/2007.	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified	On 6/24/09, the Court approved the Public Guardian's first account, including dispensation of further accounts.	
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Petitioner has not received any compensation for services on behalf of the conservatee since the end of the first account period on 2/23/09. This period covers almost 7 years.	
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Conservator - <b>\$13,957.84</b> (111.97 Deputy hours @ \$96/hr and 42.22 Staff hours @ \$76/hr)	
	Conf. Screen		
	Letters		
	Duties/Supp	Attorney - <b>\$1,250.00</b> (less than allowed per Local Rule)	
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 2/24/16
			Updates:
			Recommendation:
			File 3- Wilson

**4 Virginia Ramirez & Zoey Flores (GUARD/P)****Case No. 10CEPR01125**

Petitioner Garza, Angie (pro per – paternal aunt)

Objector Ramirez, Valerie (Pro Per – Mother)

Objector Flores, Christopher (Pro Per – Father)

**Petition for Appointment of Guardian of the Person**

<u>TEMPORARY EXPIRES 02/29/16</u>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
ANGIE GARZA, paternal aunt, is Petitioner.		<b>Note:</b> This Petition is for Zoey only. Patricia & Enrique De La Torre (maternal grandmother and step-grandfather) were appointed Co-Guardians of Virginia on 03/01/11.  <b>Minute Order of 02/18/2016 (Temporary Hearing):</b> Parents disagree with the petition. The Court grants temporary to keep the status quo. Also the Court orders supervised visits for both parents on Saturday 02/20/2016 and 02/27/2016 from 11am to 1am at the McDonald's on Clovis and Kings Canyon.  1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"><li>• Christopher Flores (Father)</li><li>• Valerie Ramirez (<del>Mother</del>) served only 9 days prior to hearing.</li></ul> <b>Please see additional page</b>
<u>Please see petition for details</u>		
Cont. from		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail	w/	
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.	w/	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 02/24/2016
<b>Updates:</b> 02/25/2016
<b>Recommendation:</b>
<b>File 4- Ramirez &amp; Flores</b>

**NEEDS/PROBLEMS/COMMENTS:**

2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
  - Jesus Flores (Paternal Grandfather)
  - Trinny Flores (Paternal Grandmother)
  - ~~Gustavo Ramirez (Maternal Grandfather)~~ served only 11 days prior to the hearing and not the required 15 days.
  - ~~Patricia De La Torre (Maternal Grandmother)~~ served only 10 days prior to hearing and not the required 15 days.
  - ~~Virginia Ramirez (Sibling)~~ served only 10 days prior to hearing and not the required 15 days.
3. It is unclear if the following persons, Trinny Flores, Jesus G. Flores and Christopher J. Flores were actually noticed properly as the Notice of Hearing filed 02/26/2016 lists several different dates and times with the "1<sup>st</sup> attempt, 2<sup>nd</sup> attempt, and 3<sup>rd</sup> attempt" along the top of the date and time service was made portion of the proof of service. Need clarification.

**For Objectors:**

1. Need copy of the Objections filed on 02/24/2016 to be served on Petitioner.

**Attorney Hiyama, Dean (for Carol M. Smiley – Petitioner – Conservator)****Second Account and Report of Conservator, Petition for Allowance of Fees to  
Conservator and Attorney's Fees and for Increase in Bond Amount**

<b>Age: 91</b>	<b>CAROL M. SMILEY</b> , niece and Conservator of the Person and Estate, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR. Amended</u></b> <b><u>Petition filed 02/18/2016.</u></b> <b><u>Hearing is set for</u></b> <b><u>03/29/2016.</u></b>  1. Need proof of service of Notice of Hearing per Probate Code § 1460(b)(2) on the conservatee, Belmira V. Williams.  2. Current bond on file is \$216,608.00. The first account ordered the bond increased to \$671,801.12 on 11/08/2015 however a receipt of bond in that amount was never filed. Need increased to \$567,900.64 for a total bond of \$784,508.65.  3. It appears that there is an outstanding fee of \$365 from 10/01/2015 for Court Investigation fees.  4. Accounting includes interest on the various EE series bonds. Unless the bonds are cashed the bonds should be accounted for at their carry value and the interest thereon is not reported.  <b><u>Please see additional page</u></b>
<b>Cont. from 012516</b>	<b>Account period: 8/01/2012 - 07/31/2014</b>	
<b>Aff.Sub.Wit.</b>	Accounting - <b>\$757,055.22</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Beginning POH - <b>\$607,684.80</b>	
<b>Inventory</b>	Ending POH - <b>\$634,697.50</b> (\$134,885.31 is cash)	
<b>PTC</b>	Conservator - <b>\$720.00</b> (per itemization in Exhibit B, for 48 hours @ \$15/hour)	
<b>Not.Cred.</b>	Attorney - <b>\$3,415.12</b> (per declaration and itemization, for 28.5 hours @ \$250 attorney rate and \$110 assistant rate)	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Bond - <b>\$216,608.00</b> (insufficient)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	<b>Petitioner requests</b> bond be increased pursuant to Probate Code § 2320(c) due to the appraised value of the Conservatee's assets being more than projected; Petitioner requests the Court order an additional bond in the amount of <b>\$134,806.88</b> to bring the total amount of bond to <b>\$590,000.00. See Examiner Note #2</b>	
<b>Aff.Pub.</b>	<b>Petitioner prays for an order:</b>	
<b>Sp.Ntc.</b>	1. Approving allowing and setting the First Account;	
<b>Pers.Serv.</b>	2. Authorizing the Conservator and Attorney fees and commissions; and	
<b>Conf. Screen</b>	3. Increasing the bond and ordering Conservator to file additional bond of <b>\$134,806.88</b> for a total bond of <b>\$590,000.00.</b>	
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 02/24/2016
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 5- Williams</b>

5. Need clarification as to rental income. Each month rental income appears to vary between \$900 and \$1,100.
6. Accounting lists Retirement Pension Check in the amount of \$1,848.87 for the months of August, September, October, November and December of 2012 however each month thereafter the Retirement Pension Check is \$1,882.87, a decrease of \$34. The Court may require clarification.
7. Accounting lists SSA check in the amount of \$439 for the months of August, September, October, November and December of 2012 however each month thereafter the SSA check is \$308, a decrease of \$131. The Court may require clarification.
8. Accounting lists various transfers between Wells Fargo accounts, pursuant to Probate Code 1063(b) if there were purchases or other changes in the form of assets occurring during the period of the account, there shall be a schedule showing these transactions. However, no reporting is required for transfers between cash or accounts in a financial institution or money market mutual funds.
9. Petition requests attorney fees in the amount of \$3,415.00 however the prayer of the petition requests attorney fees in the amount of \$3,290.00. Need clarification.
10. Attorney is requesting fees in the amount of \$3,415.00 however the Declaration of Attorney Dean Hiyama in Support of Request for Fees does not comply with Cal. Rules of Court, Rule 7.751(b) and 7.702 for instance the nature and difficulty of the tasks performed, qualification of the paralegal, describe the services rendered in sufficient detail to demonstrate the productivity of the time spent.

**Note: Order has been interlineated to reflect the correct bond amount.**

**Note:** Court will set status hearings as follows:

- **Monday, February 22, 2016** at 9:00 a.m. in Dept. 303, for filing proof of increased bond;
- **Monday, January 22, 2018** at 9:00 a.m. in Dept. 303, for third accounting.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.



**6 Willie Young (Estate)****Case No. 14CEPR00420****Attorney BALGLEY, ELISE M (of Newark, California for Howard Young – Administrator)****Probate Status Hearing RE: Proof of Funds in Blocked Account**

<b>DOD: 06/17/2013</b>	<b>HOWARD YOUNG</b> , was appointed Administrator with limited Authority, without bond on 09/02/2014.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Letters issued 09/05/2014.	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>	Final Inventory and Appraisal filed 02/13/2015 shows an estate valued at \$150,000.00.	<b>Note: First and Final Account was filed 02/17/2016. Hearing is set for 03/28/2016.</b>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>	Order Confirming Sale of Real Property was signed on 01/27/2016 in the amount of \$190,000.00.	1. Need Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account on the mandatory Judicial Council form MC-356.
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>	Minute Order of 01/25/2016 set this status hearing for the filing of the Proof of Funds in Blocked Account.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>	Attorney Balgley filed a document entitled <i>Proof of Deposit of Funds in Blocked Account</i> on 02/16/2016 which states per the Court's order of 01/25/2016, the net sale proceeds of the Estate's real property have been deposited into a blocked account at California Bank of Commerce (formerly Pan Pacific Bank).	
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		<b>Reviewed by: LV</b>
<b>Status Rpt</b>		<b>Reviewed on: 02/24/2016</b>
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>		<b>File 6- Young</b>

**7 Margaret Connie Magallanes (Estate)****Case No. 14CEPR00578**

Attorney: Anthony G. Celaya (for Petitioner Felix C. Magallanes)

Attorney: Jeffrey B. Pape (for Margie Martinez and Monica Magallanes)

**Complete Restatement of First and Final Account, Report of Administrator,  
Petition for Statutory Fees and for Distribution of Intestate Estate**

<b>DOD: 11/5/13</b>		<b>FELIX C. MAGALLANES</b> , Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Need Amended Account, based on but not limited to the following:</b>  1. Need Inventory and Appraisal for stocks. 2. Inventory and Appraisal filed on includes a Wells Fargo account valued at \$205,128.86. Petition states this account had designated beneficiaries. Accounts with designated beneficiaries should not be included in the estate. 3. Fee base includes the Wells Fargo Account. Only assets of the estate should be included. Therefore it appears that the statutory fees are incorrect. 4. Summary of account includes the increase in value of the stocks. All assets should be listed at their carry value and not the current market value. 5. Summary of Account includes a "nominal adjustment" of \$157.26 to make the account balance. There is no provision in the code for adjustments to balance the account.  <b>Please see additional page</b>
		Account period: 11/5/13 – 12/31/15	
<b>Cont. from</b>		Accounting - <b>\$1,299,091.65</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH- <b>\$ 896,628.86</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$1,235,886.84</b>	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Administrator - <b>\$25,585.43</b> (greater than statutory)	
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Administrator costs - <b>\$23,271.35</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	10/21/14	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

**NEEDS/PROBLEMS/COMMENTS (cont.):**

6. Disbursement schedule shows payment to the probate referee in the amount of \$708.50 and reimbursement of estate expense reimbursable to Petitioner also shows a payment to the probate referee in the amount of \$708.50. This appears to be a duplicate charge.
7. Need Notice of Hearing with proof of service on all interested parties.
8. Reimbursement of costs to Administrator lists several items for what appears to be a property on Alaska St. There is no Alaska St. property listed on the inventory and appraisal or in the accounting. Need clarification.
9. Petition state the administrator has paid the attorney \$25,585.43 and requests reimbursement. California Rules of Court Rule 7.700 states the personal representative must neither pay nor receive, and the attorney for the personal representative must not receive, statutory commissions or fees in advance of an order of the court authorizing payment.

Attorney Fanucchi, Edward L. (for Executor Andrew Quercia)

## First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation to Executor and Attorney for Ordinary and Extraordinary Services, for Reimbursements of Costs Advanced and for Final Distribution

<b>DOD: 6/22/14</b>	<b>ANDREW QUERCIA</b> , Son and Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		The following remains noted for the Court's consideration:
<b>Cont. from 012516</b>	<b>Account period: 6/23/14 – 11/17/15</b>	1. The amount of \$7,529.40 was paid by the estate to the attorney in connection with the rental property without Court authorization for services billed and paid by the estate after the decedent's death, which should have been treated as extraordinary services to the estate under the Probate Code, Cal. Rules of Court, and Local Rules, requiring noticed petition and authorization.
<b>Aff.Sub.Wit.</b>	Accounting: \$298,922.88 Beginning POH: \$247,731.64 Ending POH: \$226,414.03 (\$221,764.24 cash plus Unlawful Detainer Judgment in 14CECL08401 in the amount of \$4,649.79)	
✓ <b>Verified</b>	<b>Petitioner states</b> he took the following actions after notice of proposed action:	See Attorney Fanucchi's Declaration filed 2/16/16.
✓ <b>Inventory</b>	<ul style="list-style-type: none"> <li>Distribution of specific cash bequests</li> <li>Sale of real property (\$25,000 gain on sale)</li> <li>Preliminary cash distribution of \$5,000 each to beneficiaries Andrew Quercia and Maurice Quercia</li> </ul>	
✓ <b>PTC</b>	<b>Executor (Statutory): \$8,933.64</b>	Reviewed by: skc
✓ <b>Not.Cred.</b>	<b>Attorney (Statutory): \$8,933.64</b>	
✓ <b>Notice of Hrg</b>	<b>Attorney (Extraordinary): \$2,995.00</b> (for attorney and paralegal time in connection with the sale of the real property as itemized in Exhibit D and Declaration filed 2/16/16.)	Reviewed on: 2/25/16
✓ <b>Aff.Mail</b>		Updates:
<b>Aff.Pub.</b>		<b>Recommendation:</b>
<b>Sp.Ntc.</b>		<b>File 8- Quercia</b>
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
✓ <b>Letters</b>	<b>Attorney (Other): \$7,529.40 (paid)</b> (Petitioner states that prior to the decedent's death, the decedent had hired Quinlan, Kershaw & Fanucchi LLP to handle all legal issues dealing with the rental property of the estate and the firm continued to handle all legal matters relating to the rental property throughout the administration of the estate, as well as the general financial maintenance on the properties until appointment of the executor. There were several matters that required legal attention with the tenants including unlawful detainer actions, three-day notices, and misc. tasks requiring tenant contact. Pursuant to billing statement attached at Exhibit B, the firm was paid \$7,529.40 for these legal services. See also Declaration filed 2/16/16.)	
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
✓ <b>9202</b>		
✓ <b>Order</b>		
<b>Aff. Posting</b>	<b>Costs: \$906.00</b> (filing, publication, certified copies)	
<b>Status Rpt</b>	<b>Closing: \$1,500.00</b>	
<b>UCCJEA</b>	<b>Distribution pursuant to Decedent's will:</b>	
<b>Citation</b>	Andrew Quercia: \$99,247.73 plus a 50% interest in the UD Judgment	
✓ <b>FTB Notice</b>	Maurice Quercia: \$99,247.73 plus a 50% interest in the UD Judgment	

**9 Jennifer Barrios (GUARD/P)****Case No. 14CEPR00769****Petitioner Aida Barrios (Pro Per – Mother)****Petition for Termination of Guardianship**

<b>Age: 16</b>	<b>AIDA BARRIOS</b> , mother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"><li>• Isidro Barrios (Father)</li><li>• Annette Galvan (Guardian)</li><li>• Jennifer Barrios (Minor)</li><li>• Paternal Grandparents (Not Listed)</li><li>• Maternal Grandparents (Not Listed)</li></ul>
	<u><b>Please see petition for details</b></u>	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input checked="" type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 02/25/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 9- Barrios</b>

**10 Evelyn Azarian (Estate)**

Case No. 14CEPR00886

Attorney Baldwin, Kenneth A.; Cunningham, Nicole; of McCormick Barstow (for Petitioners Seanna Haslouer and Amy Haslouer Hansen)

Attorney Burnside, Leigh W.; Johnson, Summer A.; of Dowling Aaron, Inc. (for Barbara Gill)

**Probate Status Hearing Re: Resolution of Petition for Order to Return Property to Decedent's Estate**

<b>DOD: 10/25/2013</b>		<p><b>SEANNA HASLOUER and AMY HASLOUER HANSEN</b>, grandchildren and Beneficiaries, filed on 9/26/2014 a <i>Petition for Order to Return Property to Decedent's Estate</i>, seeking the return of specific items of personal property, and the distribution to the Petitioners as the specific devisees certain items of personal property, including jewelry.</p> <p><b>BARBARA GILL</b> (caregiver) filed a <i>Demurrer to Petition for Order to Return Property to Decedent's Estate; Memorandum of Points and Authorities</i> on 11/6/2014.</p> <p><b>Order on Demurrer filed 4/9/2015</b> overruled the demurrer.</p> <p><b>Status Declaration of Leigh W. Burnside for the previous hearing filed on 1/21/2016 states:</b></p> <ul style="list-style-type: none"> <li>This matter settled in September 2015 with all of the parties signing a written <i>Settlement and Mutual Release Agreement</i> [on or about 9/14/2015], which contemplated that <b>BARBARA GILL</b>, the former attorney-in-fact for the Decedent and the Trustee of the <b>EVELYN AZARIAN LIVING TRUST</b>, would distribute to Petitioners certain personal property contained in the urn holding the cremains of the Decedent and her husband, <b>ALBERT AZARIAN</b>;</li> <li>Following execution of the settlement, Petitioners collected the namely jewelry from the cremains of the Decedent and Dr. Azarian, and the urn was returned to the niche at Chapel of the Light;</li> <li>Additionally, Ms. Gill distributed the bulk of the <b>EVELYN AZARIAN LIVING TRUST</b> assets to Petitioners in early October 2015;</li> <li>In late December 2015, Ms. Gill distributed the balance of the assets in the Trust to Petitioners, after paying the final expenses of the Trust; Ms. Gill will be providing Petitioners' counsel with copies of the December 2015 bank statements for the Trust accounts to show the expenses that she paid prior to distributing the remaining cash to Petitioners;</li> <li>Upon presentation of the statements, Ms. Burnside anticipates that Petitioners' counsel will file a request for dismissal and this matter will be concluded.</li> </ul>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR.</b> Dismissal entered on 2/26/16</p>
<b>Cont. from 012715, 111615, 012516</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b> w /		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 2/24/16</p> <p><b>Updates:</b></p> <p><b>Recommendation</b></p> <p><b>File 10 - Azarian</b></p>	

# 11 Emma JoAnn Brewer (Estate) Case No. 14CEPR01087

Executor Cavanaugh, Debora A. (Pro Per)

Probate Status Hearing RE: Filing of an Amended Petition

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b><u>OFF CALENDAR.</u></b>  <b><u>Amended Petition filed</u></b>  <b><u>02/22/2016. Hearing is set for</u></b>  <b><u>04/06/2016.</u></b></p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 02/25/2016
		Updates:
		Recommendation:
		File 11- Brewer

Petitioner Ferguson, Anita Marie (Pro Per – Fiancée – Petitioner)

Attorney Petty-Jones, Teresa (for Objector Anne Todd-Cortez)

## Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA

DOD: 7/25/14		<b>SPECIAL ADMINISTRATION EXPIRED</b> 1/28/16 (Letters never issued)		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
				<b>Note:</b> Objector Anne Todd-Cortez' Motion to Consolidate or Stay is Page B.	
				<b>Minute Order 1/28/16:</b> Ms. Petty hands Ms. Ferguson her extra set of Examiner notes. The Letters of Special Administration are not extended, and the Court orders that there is to be no action of any kind for any reason on this matter between now and 2/29/16.	
Cont from 050715, 061815, 081315, 092415, 102215, 120315, 012816		ANITA MARIE FERGUSON, named executor with bond of \$39,000.00 (bond filed 11/25/15), is Petitioner.		<b>Note:</b> Order Appointing Special Administrator filed 12/16/15 authorizes Anita Marie Ferguson as Special Administrator with bond of \$39,000.00 to appear in and represent the interests of the Estate of Howard Fleming in <i>Anita Ferguson v. MRO Investments, et al.</i> , Fresno Superior Court Case No. 15CECG02501.	
✓	Aff.Sub.Wit.		Full IAEA – ok		
✓	Verified		Will dated 3/14/04		
	Inventory		Residence: Fresno		
	PTC		Publication: Fresno Bee		
	Not.Cred.		Estimated value of estate: Personal property: \$8,000.00 Real property: \$31,000.00 (\$55,000.00 encumbered for \$24,000.00)		
✓	Notice of Hrg		Probate Referee: Steven Diebert		
✓	Aff.Mail	w	<b>Opposition filed 1/13/15 states</b> at the time of his death, the decedent had two siblings, Anne Todd-Cortez and Charles Fleming, both residents of Fresno County. Also at the time of his death, the decedent was married to Leeann Fleming. Petitioner knew Leeann Fleming as the wife of the decedent. On 4/17/15, the State Registrar – Office of Vital Records issued an Affidavit to Amend Howard Edward Fleming's death certificate correcting item 12 from "divorced" to "married" and further identifying Leeann as surviving spouse.	<b>Note:</b> Although Petitioner did file a bond on 11/25/15 in connection with her Petition for Probate, the bond appears to reflect appointment as Executor with full authority on 10/21/15, which is incorrect as she has not been appointed Executor. The Court may require a separate or more specific bond in order for Letters of Special Administration to issue.	
✓	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
✓	Letters			<b>SEE ADDITIONAL PAGES</b>	
✓	Duties/Supp			Reviewed by: skc	
✓	Objections			Reviewed on: 2/24/16	
	Video Receipt			Updates:	
	CI Report			Recommendation:	
	9202			File 12A - Flemming	
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				

**SEE ADDITIONAL PAGES**



**Objector states** on or about 7/26/14, the day after the decedent's death, Linda and Raymond Jackson (Raymond is the brother of the decedent's mother Fayola Fleming) visited Petitioner to see how she was doing. Petitioner told them the decedent had a will that was not properly witnessed and asked Linda if she thought that would be a problem.

At the time of his death, the decedent and Anne held title as joint tenants to real property in Fresno County. A notice of death of joint tenant was filed by Anne with the Fresno County Recorder on 12/10/14. Said property was sold to MRO Investments, Inc., in June 2015. On 6/24/15, MRO filed an unlawful detainer to evict Petitioner from the property. On 8/7/15, Petitioner filed a complaint for quiet title against MRO and Anne. The UD and quiet title actions were consolidated into the quiet title action 15CECG02501.

A Notice of Motion and Motion to Consolidate, or in the Alternative to Stay this probate action has been filed seeking to consolidate this matter with 15CECG02501. *[Examiner's Note: This motion is set for 2/9/16 at 9:00 am in Dept. 303.]*

Objector states the petition and ex parte request for special powers contain intentional misrepresentations to the court regarding the decedent's marital status and heirs. Petitioner has failed to give proper notice to all interested parties. Petitioner told family members the day after his death that the decedent's will was not witnessed, yet the instrument she has filed with the court bears handwriting of at least two people and the signature of three witnesses.

Objector states this matter should be consolidated with the existing consolidated actions under Case No. 15CECG02501 or in the alternative the probate action should be stayed. If the quiet title shows that Petitioner has no interest in the property, this case becomes moot because as Petitioner's pleadings show, without the property the estate is below the jurisdictional threshold.

Objector states this matter should be denied until Petitioner amends her petition to correct intentional misrepresentations and proper notice has been provided by law. Furthermore, any powers given to Petitioner as a representative of the estate should be immediately revoked based upon her intentional misrepresentations made to this court. Moreover, this matter should be consolidated with 15CECG02501 or stayed until after the quiet title action is determined.

**Response to Objection filed 1/26/15 by Petitioner Anita Marie Ferguson states** Objector does not seek to inherit from her late brother; rather, the purpose is to prevent administration of the estate. Petitioner on her own behalf and on behalf of the estate has filed *Anita Ferguson v. MRO Investments, Inc., et al.*, 15CECG02501 alleging that Anne Todd-Cortez wrongfully transferred title to the real property on South Anna in Fresno and that such wrongful actions caused damage to Petitioner and to the estate. In the response, Objector has interposed two demurrers, the second of which is set for hearing on 3/17/16.

Objector argues that Petitioner lacks standing to pursue any actions on behalf of the estate. That is what this objection is really about. Objector wants to derail this lawsuit and prevent the decedent's estate from recovering its interest in the real property. The Court has circumscribed powers to adjudicate ownership of the real property. See authority cited.

**SEE ADDITIONAL PAGES**

**Petitioner's Response to Objection (Cont'd):** Petitioner states one purpose of probate administration is to marshal the assets of the estate. See authority cited. Petitioner seeks to proceed with administration to adjudicate the estate's claim to the real property, which will further the purposes of probate. Accordingly, the objections should be overruled.

Decedent's marital status: To Petitioner's great surprise, the decedent's sister, Objector Anne Todd-Cortez, has asserted that the decedent was still married to Leeann Fleming at the time of his death. Petitioner has assembled pleadings from the 1996 dissolution case involving the decedent and Leeann Fleming and requests judicial notice of same. It appears default was entered against the decedent, which default was set aside by order of Madera County Superior Court, which subsequently transferred the case to Fresno Superior Court. The Court's Odyssey page shows that the divorce was final on 7/11/1997. See attached Judgment at Exhibit B.

Petitioner states when Leeann Fleming purchased her residence on Fremont Avenue in 2001, she took title as "an unmarried woman as her sole and separate property," and the grant deed recorded 12/21/01 reflects the borrower as "Leeann Fleming, an unmarried woman." Thus, the evidence demonstrates that Ms. Fleming held herself out to the world as an unmarried woman. Petitioner believed the divorce was complete.

Further, the decedent's will was made in 2004, after commencement of the divorce action and after Leeann Fleming purchased her residence. Decedent's marital status is not grounds to dismiss this probate proceeding. If the court grants the relief requested by Objector, the estate will never be probated and assets will be lost.

Temporary Letters: In response to the first demurrer Petitioner requested temporary letters of administration. Although a bond has been filed, the court has not yet issued letters of administration.

Petitioner states the Court may wish to continue this matter to allow for notice and/or further briefing. Pending such further hearing, the Court should issue letters, which will address the issue of standing raised in the demurrer.

**Petitioner states** the will should be admitted to probate. Petitioner concludes that Objector is only interested because it impacts her wrongful attempts to sell real property belonging to the decedent. As alleged in the lawsuit, Objector sold her interest in the real property to the decedent and Petitioner in 2004, and by such sale severed her joint tenancy interest. But Objector never recorded a deed in favor of her brother and Petitioner, instead reserving an undocumented mortgage in the property. After her brother's death, Objector wrongfully recorded an Affidavit of death of joint tenant thereby claiming the property for herself. Now with her hand caught in the proverbial cookie jar, she is attempting to derail the probate to cover up her wrongful acts. The Court should look through the objection and see it for what it really is – an attempt to conceal Anne Todd-Cortez' misappropriation of estate assets. Accordingly, the objection should be overruled and letters of administration (sic) should issue to Petitioner.

**SEE ADDITIONAL PAGES**

**NEEDS/PROBLEMS/COMMENTS:**

1. As previously noted, it appears the decedent's divorce was never actually finalized. The judgment entered in July 1997 in Madera was set aside, and after the case was transferred to Fresno, a new judgment was never entered. Although the petition and declarations indicate that both the decedent and his spouse apparently believed they were divorced, the Court may require service of Notice of Petition to Administer Estate to the spouse, Leeann Fleming.
2. As previously noted, the objection alleges that the decedent also had a brother, Charles Fleming who is entitled to notice of these proceedings. Continuance may be required for notice to. Need service of Notice of Petition to Administer Estate on the brother, Charles Fleming.
3. As noted above, although Petitioner did file a bond on 11/25/15 in connection with her Petition for Probate, the bond appears to reflect appointment as Executor with full authority on 10/21/15, which is incorrect as she has not been appointed Executor and the will has not been admitted to probate. The Court may require a separate or more specific bond in order for Letters of Special Administration to issue.

**Note:** This estate was opened with a fee waiver. Please note that upon distribution, all Court filing fees will be due.

**Note:** If granted, the Court will set status hearings as follows:

- Monday, April 11, 2016 for proof of corrected bond, if required
- Monday, July 25, 2016 for filing Inventory and Appraisal
- Monday, April 24, 2017 for filing the first account or petition for final distribution.

If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.



**Movant states (Cont'd):** In her lawsuit against Ms. Cortez, Ms. Ferguson has alleged that she and the decedent entered into an agreement to purchase the property over time. The decedent died on 7/25/14. Ms. Cortez obtained an amended Certificate of Death because the decedent was still married at the time of his death, whereas the original stated erroneously that he was divorced. Ms. Cortez then recorded an Affidavit of Death of a Joint Tenant for the property on 12/10/14.

On 3/24/15, Ms. Ferguson filed her petition for probate, alleging the value of the estate at \$39,000, the bulk of that attributed to the property. Ms. Ferguson falsely claimed in her petition that the decedent was not married at the time of his death.

On 6/18/15, Ms. Cortez sold the property to MRO Investments, Inc., which then filed an unlawful detainer to evict Ms. Ferguson from the property (15CDCL04609). Ms. Ferguson then filed a quiet title action as 15CECG02501. The two cases were consolidated on 9/30/15 with 15CECG02501 as lead.

Ms. Cortez has filed an objection to Ms. Ferguson's petition on the grounds that she, the decedent's brother, and the decedent's wife were not properly served with notice of the action, and Ms. Ferguson represented that the decedent was not married when that was not the case.

1. Movant states this probate estate should be consolidated with the quiet title action because its outcome would likely prove dispositive here. See authority.
2. In the alternative, Movant states this case should be stayed pending resolution of the quiet title case. See authority.

**Movant states the cases here turn on the same issue. In order to avoid unnecessary duplication and risk of inconsistent adjudications as well as to promote judicial efficiency, the Court should grant this motion and consolidate the cases.**

**Anita Ferguson filed Opposition on 2/24/16.** Ms. Ferguson states the motion does not identify the actions that she wants consolidated and the Court should deny the motion based on Cal. Rule of Court 3.350. Ms. Ferguson assumes Ms. Cortez wants to consolidate this probate proceeding with 15CECG02501; however, such application is contrary to the policies of this court. The probate court is concerned with the administration of the decedent's estate. See authority. The probate court is not a general trial court and does not have the resources to try an action over several days. 15CECG02501 concerns real property as to which multiple persons, including the estate, are claimants. It is not a matter that solely concerns assets of the estate. The trial in 15CECG02501 will involve persons who have no interest in this probate proceeding. If consolidation were granted, the court would only send the trial out to a different department as a long cause matter, which would undermine the rationale for any joinder with this action. For the foregoing reasons, the motion for consolidation should be denied.

<b>DOD: 03/25/2015</b>	<p><b>KENNETH EUGENE BARGER</b>, son, was appointed Executor with full IAEA authority without bond on 09/21/2015.</p> <p>Letters issued on 09/21/2015.</p> <p>Minute Order of 09/21/2016 set this status hearing for the filing of the Inventory and Appraisal.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>OFF CALENDAR.</u></b></p> <p><b><u>Final Inventory and Appraisal filed 02/25/2016.</u></b></p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 02/24/2016</p> <p><b>Updates:</b> 02/25/2016</p> <p><b>Recommendation:</b></p> <p><b>File 13- Barger</b></p>	

## Probate Status Hearing

## RE: Filing of the Inventory and Appraisal

	<b>KENNETH A. KEARNS</b> was appointed Conservator of the Person and Estate on 9/24/15 with bond of \$95,415.10.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 1/25/16 (Status re filing I&amp;A):</u> Counsel will talk with regard to whom should file the Inventory and Appraisal. Ms. Kruthers advises that the final account of the Public Guardian is set for 2/1/16, so she will report further at that time as to discussions. <u>Continued to 2/29/16.</u>  <u>Minute Order 2/1/16 (PG's First and Final Account):</u> Counsel requests 30 days due to the issue raised by Mr. Shahbazian with regard to whom should file the Inventory and Appraisal. <u>Continued to 3/7/16.</u>  <u>Note:</u> A Report of Sale and Petition for Order Confirming Sale of Real Property was filed 2/4/16 and is set for hearing on 3/16/16.  1. Need Final Inventory and Appraisal pursuant to Probate Code §2610 or written status report pursuant to Local Rule 7.5.
<b>Cont. from 012516</b>		
Aff.Sub.Wit.	Bond was filed 10/27/15 and Letters issued on 10/27/15.	
Verified		
Inventory	At the hearing on 9/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
PTC		
Not.Cred.		
Notice of Hrg	Partial I&A No. 1 was filed 11/16/15.	
Aff.Mail		
Aff.Pub.	A Final I&A has not yet been filed.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 2/23/16
		Updates:
		Recommendation:
		File 14- Walters

Petitioner Nitza Lynn Maldonado (Pro Per)  
 Guardian Twilla Mae Maldonado (Pro Per)  
 Guardian Alex Maldonado (Pro Per)

## Petition for Visitation

		<b>NITZA LYNN MALDONADO</b> , mother, is Petitioner.  <p style="text-align: center;"><i>~Please see petition for details~</i></p> <b>Objection/Response to Petition for Visitation</b> filed by <b>TWILLA</b> and <b>ALEX MALDONADO</b> , Co-Guardians, on 2/18/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Needs/Problems/Comments for Petitioner:</b></u>  1. Need Notice of Hearing.  2. Need proof of 15 days' service prior to hearing of the Notice of Hearing with a copy of the Petition for Visitation or Consent and Waiver of Notice, or Declaration of Due Diligence, for: • <b>Twilla Maldonado</b> , Guardian; • <b>Alex Maldonado</b> , Guardian;  <u><b>Needs/Problems/Comments for Objector:</b></u>  1. Need proof of 15 days' service prior to hearing of the Notice of Hearing with a copy of the Objection/Response to Petition for Visitation, for: • <b>Nitza Maldonado</b> , Petitioner.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: LEG	
Reviewed on: 2/24/16	
Updates:	
Recommendation:	
File 15- Ramirez-Maldonado	



Attorney Gerald M. Tomassian (for Executor Deana M. Nunn)

## Probate Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 5/31/2015</b>	<b>DEANA M. NUNN</b> , daughter, was appointed Executor with Full IAEA authority without bond on 9/28/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b), or verified <i>Status Report</i> and proof of service of notice of the Status Hearing pursuant to Local Rule 7.5(B).
<b>Cont. from</b>	<b>Letters issued on 9/29/2015.</b>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	<b>Pursuant to Probate Code § 8800(b)</b> , <i>Final Inventory and Appraisal</i> was due <b>1/29/2016</b> .	
<b>Inventory</b>	X	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Minute Order dated 9/28/2015</b> from the hearing on the petition for probate set the matter for a Status Hearing on 2/29/2016 for filing of the final inventory and appraisal.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202 Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 2/24/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16- Tanimoto</b>

Petition for Instructions

DOD: 8/4/12		OPHELIA LEE, Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states the only assets of the estate are eight (8) parcels of real property. There are no cash assets or other property which can be liquidated.	
	Aff.Sub.Wit.	The decedent's will devises all eight parcels of real property as specific gifts to designated individuals.	
✓	Verified		
	Inventory	Prior to and since the decedent's death, certain family members have paid mortgages, property tax, insurance, and the like for parcels which are not designated as a specific gift to them. As such, these family members have creditor claims against the estate.	
	PTC		
	Not.Cred.	There are also expenses of administration which have been paid by family members, and there will be additional administration expenses.	
✓	Notice of Hrg		
✓	Aff.Mail	Furthermore, one of the parcels was recently subject to a "blight notice" from the City of Fresno and repairs had to be promptly arranged to avoid fees and penalties. Thus, additional funds from outside the estate had to be accessed for the benefit of the estate.	
	Aff.Pub.		
	Sp.Ntc.	It is clear that cash for the estate must be generated by some means in order to meet all obligations of the estate.	
	Pers.Serv.		
	Conf. Screen	Petitioner requests instruction concerning sale of real property in order to move the estate to a point where it can be distributed in a manner reflective of the decedent's will.	
	Letters		
	Duties/Supp	<b>SEE PAGE 2</b>	
	Objections		
	Video Receipt		
	CI Report		
	9202	Reviewed by: skc	Reviewed on: 2/24/16
✓	Order		
	Aff. Posting	Updates:	
	Status Rpt	Recommendation:	
	UCCJEA	File 17- Lee	
	Citation		
	FTB Notice		

## Page 2

**Proposed course of action:** Petitioner proposes to apportion the interests in the estate among the beneficiaries according to the valuations of the estate as provided by the Probate Referee, calculated as percentage interests, as follows:

Beneficiary	Property	Value	% Interest
Jonathan (heir is Amber)	2303 S. Lotus	\$45,000	18.18%
Velma (heirs are Alton and Rodney)	921 E. Calwa	\$35,000	14.14%
James	2578 S. Lotus	\$45,000	18.18%
Ophelia	169 W. North	\$85,000	34.34%
Benjamin (heirs are Daina and Dumar)	2968 S. Newman Lot 4, Glk C, Newman Park 2962 S. Newman 177 W. North	\$15,000 \$ 2,500 \$ 5,000 \$15,000	15.15%

Petitioner proposes that she be authorized to sell one or more parcels of property to meet the obligations of the estate. She believes the first parcel that should be sold is the one located at 921 E. Calwa, which is the property that was the subject of the "blight notice." It is in a state of disrepair, poses the greatest potential liability to the estate, and Petitioner believes the ultimate beneficiaries of this parcel do not have the means to maintain it.

In the event sale of the Calwa Ave. property fails to generate sufficient cash to meet the obligations of the estate, Petitioner requests authorization to sell additional parcel or parcels after consultation with family members. Once all objections are identified and certain, Petitioner proposes that when the estate is in a condition to be closed, the obligations and assets remaining available for distribution be apportioned among the beneficiaries according to the percentages set forth above.

**Petitioner requests the Court order:**

1. Instructions that Petitioner is authorized to sell the real property located at 921 E. Calwa Avenue, Fresno, California;
2. Instructions that Petitioner is authorized to sell additional parcels of real property in the estate, in the event that the sale of the Calwa Avenue real property results in an insufficient amount of fund to meet the obligations of the estate;
3. Instructions that when the estate is in a condition to be closed, the obligations of the estate and the assets remaining available for distribution be apportioned among the beneficiaries according to the above percentages; and
4. Such other and further orders as this court may deem proper under the circumstances.

**Executor's Declaration in Support filed 2/16/16 provides new developments since the petition was filed.**

**SEE PAGE 3**

## Page 3

**Declaration filed 2/16/16 states** although she arranged for the cleanup of the Calwa Ave. property after receiving the original "blight notice," she has now received a First Administrative Citation from the City of Fresno regarding the property. The fine sought to be imposed is in the amount of \$37,500, which is more than the \$35,000 appraised value of the property. Ms. Lee plans to file a timely appeal, but cannot guarantee success or reduction in the amount of the fine. She is informed that listing the property will defer the matter and if sold "as is," any new owner will be given time to cure the matter before any fines are imposed.

Therefore, Petitioner requests authority to list the Calwa Ave. property immediately for sale.

Petitioner states she also received a water bill for the property (\$75). She contacted one of the beneficiaries entitled to that property, but he had no money to pay it, so Petitioner aid it and will include this as another entry in the creditor claim she is preparing for filing and approval by the court. Petitioner includes this matter for purpose of raising awareness that there are continuing and mounting expenses in the administration of the estate, but no funds available. It is for this reason that she requests all beneficiaries be aware that the sale of real property is not an option, but rather a necessity.

*Note: Declaration was served by mail on all interested parties on 2/12/16.*

Attorney Charles M. Palmer (for Petitioner Houa Yang)

**Conservator's Petition for Orders Authorizing Payment of Compensation for Attorney's Fees to Date**

		<p><b>HOUA YANG</b>, spouse and Conservator of the Person and Estate appointed on 10/8/2015 with bond fixed at <b>\$22,818.40</b> and deposits into blocked account of <b>\$24,000.00</b>, is Petitioner.</p> <p><b>Petitioner requests an order authorizing payment of compensation for the fees of his attorney for services to date in this matter, pursuant to Probate Code § 2640 and 2623, CA Rule of Court 7.702, and Local Rule 7.16, based upon the following:</b></p> <ul style="list-style-type: none"> <li>Petitioner seeks compensation for attorney's fees charged for services in representing Petitioner to establish the conservatorship and to thereafter act as Conservator, in the amount of <b>\$3,830.00, for 19.15 hours @ \$200.00/hour;</b></li> <li>These fees are just and reasonable because they represent only those services necessary to establish the conservatorship and to continue assisting the Conservator to execute his duties, and nothing more;</li> <li>This Petition complies with Probate Code § 2640 [subsections enumerated with statements of applicability of the instant petition];</li> <li>As per Local Rule 7.16(A), this Petition complies with CA Rule of Court 7.750 through 7.752; per Rule of Court 7.750, this Petition seeks compensation payable from the estate of the Conservatee, specifically monies received by the Conservatee under an Accelerated Benefits Rider Claim from the Conservatee's insurance company, which are deposited into a blocked account;</li> </ul> <p align="center"><b>~Please see additional page~</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li><i>Petition</i> is signed by the attorney, but is not verified by Petitioner <b>HOUA YANG</b> as the fiduciary, pursuant to Probate Code § 1021 and CA Rule of Court 7.103.  <u>Note:</u> On 2/26/16, Attorney Palmer submitted a copy of the petition signed by both attorney and petitioner; however, there still does not appear to be any verification as noted above.</li> <li><i>Final Inventory and Appraisal</i> filed 1/4/2016 appears to be incorrect based upon the fact that the <i>Order Appointing Probate Conservator</i> filed 10/8/2015 finds bond is fixed at <b>\$22,818.40</b> (proof of which was filed 10/16/2015) and finds deposits of <b>\$24,000.00</b> shall be deposited into a blocked account; further, <i>Order to Deposit Money into Blocked Account</i> authorizes <b>\$100,000.00</b> to be deposited into a blocked account (which may overstate the assets expected to be received for deposit.) The <i>Final Inventory and Appraisal</i> filed 1/4/2016 incorrectly indicates that the estate consists of <b>\$375.28</b> cash and <b>\$15,500.00</b> of personal property (jewelry and clothes). Need corrected <i>Final Inventory and Appraisal</i> that accurately reflects the entirety of the Conservatorship Estate.</li> </ol>
Cont. from			
Aff.Sub.Wit.			
Verified	X		
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

<b>Reviewed by:</b> LEG
<b>Reviewed on:</b> 2/24/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 18- Lor</b>

**Petitioner states, continued:**

- Per Rule 7.751 (a), this Petition requests compensation for services rendered before an order appointing Conservator; most of the attorney's services were rendered before such an order as they were for the purpose of establishing the conservatorship;
- Per Rule 7.752, it is in the Court's discretion whether or not to order the Conservator to file an accounting before or at the time the petition is filed or heard; this requirement should be waived for two reasons: (1) a mere 90 days has passed since Letters were issued, and thus there has been no financial activity to warrant such an accounting; (2) the bulk of monies received into the Conservatee's estate, namely benefits of **\$13,223.12**, has been placed into a blocked account where it remains untouched as of this date;
- No order for withdrawal has been issued to date, therefore, an accounting is not necessary at this point and Petitioner requests it be waived;
- Attorney services performed were interview parties involved (Conservatee, Conservator, family members and others); review records, documents and information provided by clients and family; draft and file various forms to petition for conservatorship; serve various parties notice; attend the hearing; contact various financial institutions, medical personnel, and others; open blocked account; prepare inventory and appraisal; the difficulty of these tasks was on par with typical attorney tasks.

**Petitioner requests a Court order authorizing payment of compensation for attorney's fees to date in this matter in the amount of \$3,830.00.**

**19 Jaylyn Reddix, Walterry Reddix, II (GUARD/P) Case No. 15CEPR01076**

Petitioner: Figueroa, Maria Carmen (pro per – maternal grandmother)

Petitioner: Figueroa, Melissa (pro per – maternal aunt)

**Petition for Appointment of Guardian of the Person**

		<u>TEMPORARY EXPIRES 2/29/16</u>	NEEDS/PROBLEMS/COMMENTS:
		<b>MARIA FIGUEROA and MELISSA FIGUEROA,</b>	
		maternal grandmother and aunt, is Petitioner.	
<b>Cont. from 011116</b>		Please see petition for details.	
	Aff.Sub.Wit.		
✓	Verified	<b>Objection filed 11/3/15 by Walterry Reddix</b>	
	Inventory		
	PTC		
	Not.Cred.	<b>Court Investigator filed a report on 01/05/16.</b>	
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> JF/KT
			<b>Reviewed on:</b> 2/24/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 19- Reddix</b>

## Probate Status Hearing RE: Filing of a Petition for Letters of Administration

<b>DOD: 8/5/15</b>		<b>BARBARA P. WORREL</b> , Daughter, filed a Petition for Probate of Will and for Letters Testamentary and Authorization to Administer under IAEA on 11/12/15, which was heard on 1/25/16.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Examiner's Note:</b> Given the declaration of the preparing attorney, it appears pursuant to Probate Code §6110 that the will may be admitted pursuant to Probate Code §8220 and amended petition is not necessary.	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			<p>Examiner noted that the will, created in the State of Washington, did not appear to be self-proving under California law. Per Probate Code §6113, the will is validly executed if the execution complies with the law of the place where executed.</p> <p>Examiner notes previously requested either verification that the will is compliance with Washington law, or alternatively proof of subscribing witness.</p> <p>Pursuant to the minute order of 1/25/16, the attorney had been unsuccessful in locating the attorney or the witness, so he planned to file for Letters of Administration. The Court set this status hearing re such filing.</p> <p><b>Declaration of D. Douglas Titus filed 2/4/16 states</b> he is the attorney who prepared the will, which was signed in his presence and in the presence of the attesting witnesses, all present at the same time by the decedent personally. The decedent acknowledged in their presence that that the instrument signed was her will, and he has no knowledge that it was procured by duress, menace, fraud, or undue influence.</p>
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	W		
✓	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>		<p>Full IAEA – ok</p> <p>Will dated 8/4/10</p> <p>Residence: Fresno</p> <p>Publication: Fresno Bee</p> <p>Estimated value of estate:</p> <p>Personal property: \$320,000.00</p> <p>Probate Referee: Rick Smith</p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Monday, July 25, 2016</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Monday, April 25, 2017</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 2/25/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 20- Griffin</b>	



**Petition for Appointment of Guardian of the Person**

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> This Petition is regarding Nathina Rios only.  1. Petitioner filed a Declaration of Due Diligence re Paternal Grandfather Antonio Murillo; however, Mary Perez was able to locate him and mail service in connection with her petition for guardianship of Nathina's brother. The Court may require continuance for service re this petition.	
Cont. from 012816				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 2/24/16				
Updates:				
Recommendation:				
File 21A- Rios & Esqueda				

**21A**

Petitioner Mary Perez (Pro Per – Cousin – Petitioner)

## Petition for Appointment of Guardian of the Person

See petition for details.			<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> This petition is for Brandon only. A separate petition for guardianship of Nathina filed by Adrienne Martinez is Page B of this calendar.
Cont. from 020216			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 2/24/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File</b> 21B-Rios & Esqueda

21B

**22 Kali McGuirt (GUARD/P) Case No. 15CEPR01239****Petitioner Farris, Jan Denise (Pro Per – Maternal Grandmother)****Petition for Appointment of Guardian of the Person (Initial)**

<b>Age: 1</b>	<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>JAN DENISE FARRIS</b> , maternal grandmother, is petitioner.	1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"><li>• Paternal Grandfather (Unknown)</li></ul>
<b>Cont. from</b>	<b><u>Please see petition for details</u></b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/> <b>Pers.Serv.</b>	w/	
<input checked="" type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input checked="" type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 02/25/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 22- McGuirt</b>

**23 Tiera Taylor, Ajewell Taylor, Jada Taylor (GUARD/P)****Case No. 15CEPR01247**

Petitioner Robison, Johanna L (Pro Per – Paternal Grandmother)

Objector Taylor, Kendra (Pro Per – Mother)

Petition for Appointment of Guardian of the Person (Initial)

Tiera Age: 10 yrs		<b><u>TEMPORARY DENIED ON 01/12/2016</u></b> <b><u>General Hearing set for 2/29/2016</u></b>  <b>JOHANNA ROBISON</b> , paternal grandmother, is Petitioner.  <b><u>Please see petition for details</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Robert Meginness (Father)</li> <li>• Kendra Taylor (Mother)</li> </ul> 3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Paternal Grandfather (Not Listed)</li> <li>• Thresa Canady (Maternal Grandfather)</li> <li>• Maternal Grandmother (Not Listed)</li> </ul> <b>For Objector:</b> 1. Need Objection filed 01/20/2016 served on petitioner.	
Jada Age: 8 yrs				
Ajewel Age: 7 yrs				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<b>Reviewed by:</b> LV				
<b>Reviewed on:</b> 02/25/2016				
<b>Updates:</b>				
<b>Recommendation:</b>				
<b>File 23- Taylor</b>				

## **Petition to Determine Succession to Real Property**

<b>DOD: 8/22/13</b>			<b>APRIL ADAMS, RAY DIMERY, and TAMIKO LEAVY</b> , adult children of the decedent, are Petitioners.  40 days since DOD  No other proceedings  I&A: \$80,000.00 (real property in Fresno)  Decedent died intestate  Petitioners request Court determination that the real property passes to them in 1/3 interests each.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
<b>Reviewed by:</b> skc				
<b>Reviewed on:</b> 2/25/16				
<b>Updates:</b>				
<b>Recommendation:</b> SUBMITTED				
<b>File 24- Conard</b>				

**25 The Norma Madriano 2001 Trust dated July 25, 2001 Case No. 16CEPR00052**

Attorney

Gromis, David Paul (for Petitioner Oran McNeil – Trustee)

**Petition for Determination of Property Belonging to Trust**

<b>Norma Madriano</b> DOD: 9/24/13		<b>ORAN MCNEIL</b> , Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>John Madriano</b> DOD: 12/13/97			
		<p><b>Petitioner states</b> Norma Madriano established the trust on 7/25/01 and no amendments have been found. The trust estate has been distributed except for 853 shares of Public Storage stock held in her Computershare Holder account.</p> <p>Included in the trust accounting was a total of 1,489 shares of Public Storage stock. When attempting to liquidate these shares, it was discovered that there were two separate Computershare accounts that held 1,489 shares, one held in the name of the trustee, the other titled: "Norma Madriano &amp; John Madriano JT Ten." The account titled in the trust has been liquidated and distributed. The only remaining asset accounted, 853 shares of Public Storage, remains in the individual name of the decedent.</p> <p>Petitioner states the trust Exhibit A designates certain property to the trust estate, and titles to all assets were in fact transferred into the trust. Petitioner Oran McNeil, a CPA, has acted as trustee for a number of clients over the past 50 years and was shocked to learn that the Computershare account was titled in joint tenancy.</p> <p>Petitioner provides a copy of the decedent's pour-over will, which passes any assets subject to the will to the trust.</p> <p>Attached Points and Authorities references <i>Estate of Heggstad</i> and states some of the Public Storage shares were held in the Paine Webber account referenced in the trust Exhibit A. Petitioner states the settlor would have wanted these shares to be transferred to the trust. Thus, an order confirming title to this property in the trust is appropriate.</p>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/o		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>	<p>Petitioner prays for an order confirming and determining that title to the Computershare Holder account is owned by Oran McNeil, Trustee, Norma Madriano 2001 Trust dated 7/25/01, and for such other orders as the Court deems proper.</p>	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 2/25/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 25- Madriano</b></p>
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

## Petition to Determine Succession to Real Property

<b>DOD: 12/2/13</b>		<b>LAWRENCE KELLERHALS</b> , Brother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		40 days since DOD	<b>1. The decedent's will is not self-proving. An order determining succession under the will necessarily includes a determination as to the will's validity even if the will is not technically probated. Therefore, need Proof of Subscribing Witness pursuant to Probate Code §8220.</b>	
		No other proceedings		
✓	<b>Aff.Sub.Wit.</b>	I&A: \$13,333.00 (Decedent/s 1/3 of a 40% interest in certain real property in Oakhurst, CA)  Will dated 11/12/13 devises the entire estate to Petitioner.  Petitioner requests Court determination that the decedent's interest in the real property passes to him.		
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			w
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 2/25/16	
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File 26- Kellerhals</b>	

## Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. If diligence is not found, need personal service of Notice of Hearing with a copy of the temp petition per Probate Code §2250(e) at least five court days prior to the hearing on Joshua Gaither (Father).	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2/25/16	
			Updates:	
			Recommendation:	
			File 27- Jarocki	



**28 Matthew Zamora Alvarado, Princess Zamora Alvarado, Fernando Zamora Alvarado, George Zamora Alvarado, Herman Zamora Alvarado, IV, Noah Zamora Alvarado (GUARD/P)**  
**Case No. 16CEPR00171**

Petitioner: Tiffany Zambrano (pro per)

Petitioner: Fernanda Zamora (pro per)

**Petition for Appointment of Temporary Guardian of the Person**

		<p align="center"><b>GENERAL HEARING 4/19/16</b></p> <p><b>FERNANDA ZAMORA</b>, paternal grandmother, and <b>TIFFANY ZAMBRANO</b>, paternal aunt, are petitioners.</p> <p>Please see petition for details.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Scrn			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 2/24/16	
			Updates:	
			Recommendation:	
			File 28- Alvarado	